

# Morgan Lewis

## FIFTH ANNUAL RESEARCH & DEVELOPMENT TAX CREDIT SYMPOSIUM

<b>Thursday, November 21, 2019</b>	<b>Morgan Lewis Silicon Valley 1400 Page Mill Road Palo Alto, CA 94304</b>
8:00 am – 8:30 am	<b>Breakfast and Registration</b>
8:30 am – 9:00 am	<b>Welcome Remarks</b> <i>Morgan Lewis:</i> Alex Sadler and Doug Norton
9:00 am – 10:00 am	<b>Hot Topics &amp; Technical Developments</b> <i>Ernst &amp; Young:</i> David Hudson
10:00 am – 11:00 am	<b>Pilot Models, Section 174 Issues &amp; Supply Costs</b> <i>Alvarez &amp; Marsal Taxand:</i> Kathleen King <i>DST Advisory Group:</i> Diane Stogiannes
11:00 am – 11:15 am	<b>BREAK</b>
11:15 am – 12:15 pm	<b>Claim Types &amp; Impact on Documentation and Audit</b> <i>Crowe LLP:</i> Shelby Ford and Matt Paparella
12:15 pm – 1:15 pm	<b>LUNCH</b> <b>Keynote: Transfer Pricing and International Developments Related to R&amp;D</b> <i>Morgan Lewis:</i> Bart Bassett
1:15 pm – 2:15 pm	<b>Study &amp; Audit Defense Best Practices</b> <i>MASSIE R&amp;D Tax Credits:</i> Peter Green, Colette Gagnet, and Elaine Guan
2:15 pm – 3:15 pm	<b>Industry Spotlights – Tech Industry, Payroll Offset, Auto Industry, Custom Fabrication, Microbreweries, and More</b> <i>Moss Adams:</i> Travis Riley <i>Plante Moran:</i> Julie Peters <i>Wipfli LLP:</i> Valerie Fedie
3:15 pm – 3:30 pm	<b>BREAK</b>
3:30 pm – 4:30 pm	<b>Software Development Credit Opportunities and Potential Pitfalls</b> <i>Tanner:</i> Shawn Marchant <i>alliantgroup LLP:</i> John Dies <i>Best Buy, Inc.:</i> Tim Johnson <i>Morgan Lewis:</i> Tom Linguanti
4:30 pm – 5:30 pm	<b>Thorny Computational Issues and the Post-Tax Reform Credit</b> <i>KPMG:</i> Tony Coughlan <i>Morgan Lewis:</i> Doug Norton
5:30 pm	<b>Book Raffle &amp; Cocktails</b>

### Silicon Valley Welcome Dinner (Wednesday, November 20)

- **Opening Presentation: Top 10 Research Credit Cases:** *Morgan Lewis:* Alex Sadler and Doug Norton

Please contact symposium co-chairs [Alex Sadler](#) and [Doug Norton](#), or marketing and communications coordinator [Melissa Chan](#) with any questions.